

# ESR Business Intelligence

## Troubleshooting in ESR Business Intelligence

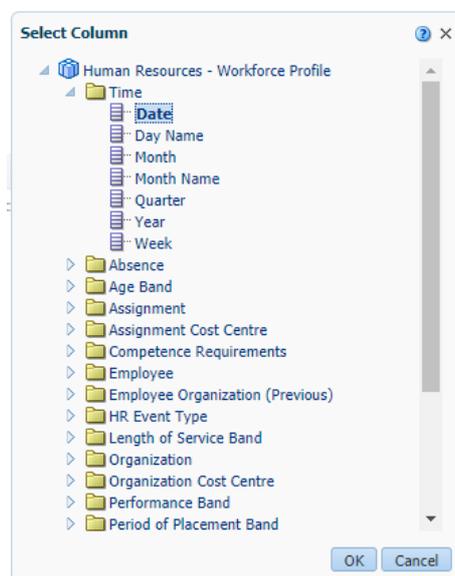
### Introduction

This document aims to resolve common issues and frequently asked questions put forward by users of ESR Business Intelligence.

National Dashboards are fully supported by the NHS ESR Central Team.

### Time Dimensions

When creating a local analysis it is essential that a time filter is added. The filter will restrict the analysis and only bring back results from a specified date or period. Failure to enter a date or period will mean that the report will take longer to run as it will bring back all of the information that ESR holds. It may also cause the report to never finish. To specify the date/s, create a date filter in the analysis. This should be the first thing that users do when creating an analysis.



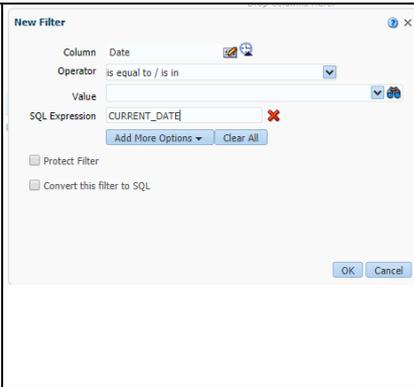
Scenario	Example
<p>If a user wishes to only return results from one date, they can set the filter to return the desired date.</p>	



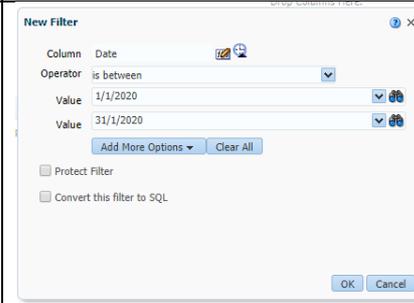
## Electronic Staff Record



If a user wishes to return the results as of the current date, regardless of when the report is run, they can do this by creating a date filter, selecting SQL Expression under 'Add More Options' and entering CURRENT\_DATE.



If a user wishes to return a range of dates, they can change the Operator to 'is between' and specify the dates within the filter.



An example of where the different subject areas are used for the differing time dimensions is in the NHS Absence Dashboard. The Detail Analysis uses a date range and Individual Absence Record returns results as of a specified date.

## Absence Listing

### [Detail Analysis](#)

List of all absence records within the period. Assignment details are as at the absence date. If assignment details change within the period, multiple rows will be returned. For a list of current assignments with absence details, use the Individual Absence Record tab.

### [Individual Absence Record](#)

List of absence records for assignments as at the effective date. All assignment details are returned as at the effective date.

## Bank Account Detail Reporting

National Dashboards do not have an analysis for reporting populated bank account detail information. There are two bank account detail reports; identifying assignments with missing account information, and a report identifying where two or more employees have the same account information.

There are no plans for the ESR Central Team to progress a national analysis which reports on populated bank account information; however users are able to create their own analysis using the Human Resources – Real Time Reporting subject area.

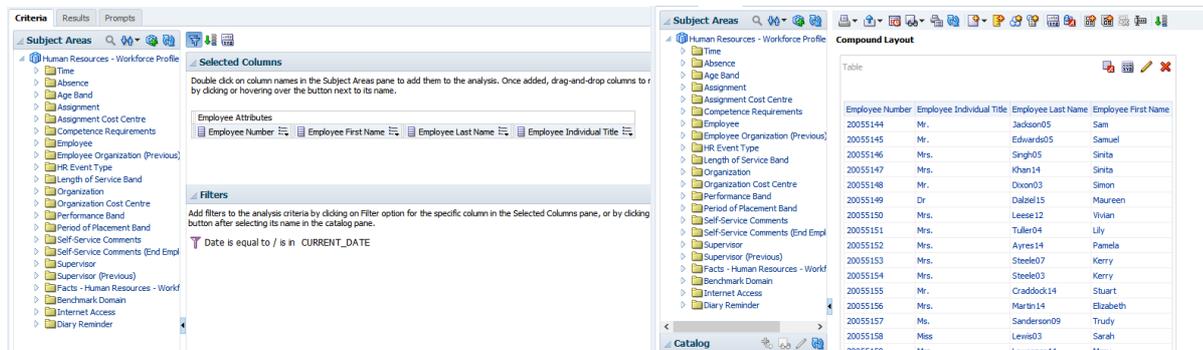
- Human Resources - Real Time Reporting
  - Employee Relations
  - Organisation Profile
  - System Data Quality
  - Batch Element Entry Messages
  - Payslip Messages
  - Recalled Leavers Report
  - Financial Cost Analysis
  - Gross Cost Table Analysis
  - Bank and Agency Staff
  - Learning Path
  - Direct Deposit
    - Bank Account Details
  - Pension Data Extract
  - Grade Scale Setup
  - Employee URP and Proxy Access

## Column Ordering

When exporting the analysis, the column ordering will export differently based on the content of the Criteria and Results page.

Exporting as a CSV file will export the analysis in the layout of the Criteria tab, and when exporting as an Excel document the analysis will export as set out in the Results tab, this includes any pivot tables and graphs.

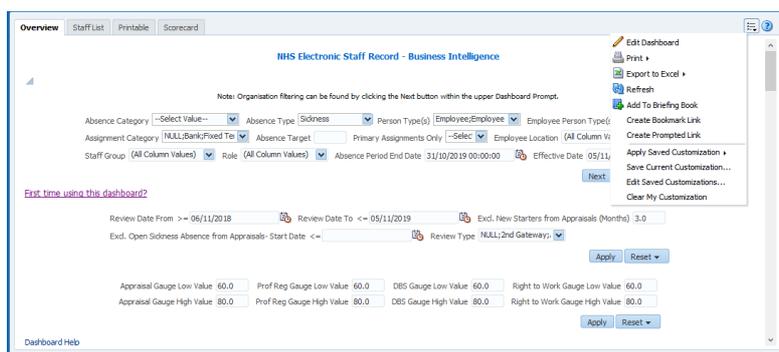
This means that when exporting as CSV, the analysis will lose any formatting that was created in the Results page.



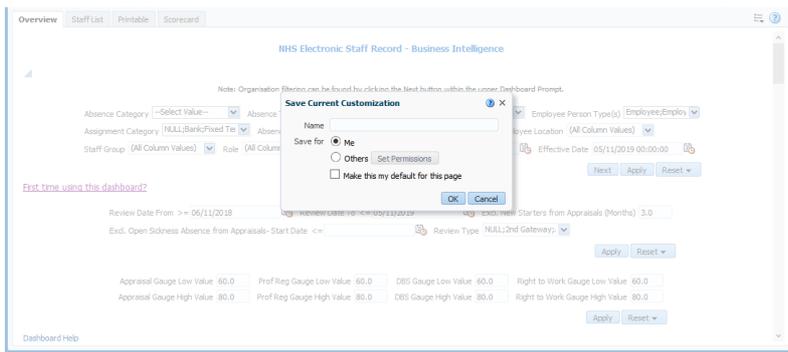
## Saving Customisations

Most of the Standard Dashboard prompts exclude Bank, Honorary and Locum employees as default.

Should users wish to change this, customisations can be made by changing the prompts and clicking on 'page options' in the top right hand corner and then 'Save Current Customisation'. This will need to be done for each Dashboard page to which you wish to apply a customisation to. This only affect's the user's Business Intelligence view and not of others within the Organisation. Once saved, the customisation will run every time the user opens the Dashboard if the user sets it to run as default or will remain in their saved customisations (under 'Apply Saved Customisation') to be used as and when required.



Multiple customisations can be created per dashboard and then named and saved accordingly. This can be shared with other users by selecting Set Permissions, however by default this will be limited to only the user's business intelligence access.



### Data is Different from National Dashboards

Users may find that when they create a local report, where the intention is that it works in a similar way to a National Dashboard, that they may get differing data to that of the National Dashboard.

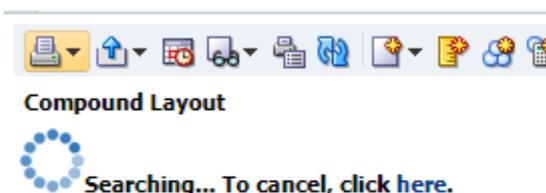
Ensure that the prompts match in the local and national versions. The prompts act as filters and the National Dashboards typically exclude ex-employees, bank, locum and honorary staff.

If this does not resolve the issue, there may be additional filters in the analysis that are affecting the results. Users can view the analysis by selecting it from the appropriate folder in the Catalog. When viewing the analysis in the Catalog, users will be able to see how the items are built; with which subject area and if there is a union for example. If it is unclear if a filter is affecting the results, remove each filter one by one, checking the results after each one is removed. When the desired information is returned, it will indicate which filter was affecting the data returned.

For more information on union analyses and how subject areas work, please see the BI Education videos [here](#)

### Local Report is not Running or is Running Slowly

Users may find that local reports fail to run or are slow in producing results. In the first instance check that there is a time filter applied to the analysis. Try to use as few subject areas as possible and ensure that only columns that are required are included within the criteria of the analysis.



If the report is a local version of one from a National Dashboard, check the BI homepage

for any updates to see if the NHS ESR Central Team have made any changes that may affect the running of your report. Taking a new copy from the Catalog will resolve the issue, however any customisations will need to be added to the report again.

The NHS ESR Central Team have produced a series of basic example analyses, designed to demonstrate to users how to create a local analysis outside of the national dashboards. These include commonly used filters (prompts in the dashboards) such as Assignment Category, Assignment Status Type, Employee Person Type, and Person Type. These can be accessed via BI Catalog > Shared Folders > NHS Standard Dashboards > NHS Example Analyses.

### Staff Missing from National Dashboards

If employees are missing from the National Dashboards and the prompts would otherwise include them, check the System DQ page of the NHS Data Quality Dashboard. This may identify problem records which could cause the employees or assignments to be omitted from the Dashboards.

Any issues should be raised as per the instructions on the dashboard.

**NHS Electronic Staff Record - Business Intelligence**

Employee Number  Applicant Number  Error Type --Select Value--

This report returns records in ESR that may have a corruption. These include records where a person has multiple primary assignments, or date-tracked values that overlap with each other.

These errors can cause issues with Discoverer and with ESR BI, therefore they should be corrected where possible. Issues with FTE budget value overlaps can be resolved by date-tracking to the period returned in this report (i.e. between the 'Effective Start Date' and 'Effective End Date'), and viewing the budget values on the assignment (from the 'Others' button). Here, delete whichever record is incorrect.

If you are unsure how to correct any of the records, please raise a **priority 4** SR ensuring you include as much information as possible about the records.

**No data**  
No data is available. You may not have any system data quality issues.  
[Refresh](#)

### Headcount Measures

Users may find that the count of employees differs between different analyses, this may be due to the use of differing headcount measures.

Headcount ("Workforce Profile Facts"."Headcount") will report the headcount of the employees only where the assignment is flagged as the primary. This is typically used in the summary analyses in the NHS Standard Dashboards, such as the NHS Staff in Post Dashboard.

This means that users may find that a summary returns fewer employees than the detail, as the detail will include all assignments within the set parameters.

#### Staff in Post

**Group by** Age Band  **Measure** Headcount   
**View as** Graph

Age Band <input type="button" value="v"/> Column Group (Default: Age Band)	Workforce Profile Facts <input type="button" value="v"/> Column Group (Default: Headcount)	Assignment <input type="button" value="v"/> FTE <input type="button" value="v"/>
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Other analyses, such as the summaries in the NHS Data Quality Dashboard use a distinct count. In these analyses the report counts the number of unique employee or assignment

numbers that meet specified criteria. It is sometimes more appropriate to count (for instance) employee numbers rather than primary assignments when returning a headcount.



## Copying a National Dashboard

Users may wish to create a local, customised version of a National Dashboard. Please be aware that in doing so, local versions will not update as and when there are updates to the National version.

National analyses are often designed to work with a corresponding national dashboard prompt.

For further information, please see *ESRBI - Using National Analyses Outside National Dashboards*.

## Formula Errors

Users can find some of the basic functions used in BI in the Quick Reference Guide, available on the Introduction to BI Homepage. If formulas are written incorrectly, BI will not accept them.

Formula syntax is invalid.  
[nQSError: 10058] A general error has occurred. Please have your System Administrator look at the log for more details on this error. (HY000)  
[nQSError: 43113] Message returned from OBIS. Please have your System

Common issues:

- `TIMESTAMPADD(SQL_TSI_DAY, 3, TIMESTAMP'2000-02-27 14:30:00')` – missing single quotation mark
- `TIMESTAMPADD(SQL_TSI_DAY, 3, TIMESTAMP'2000-02-27 14:30:00')` – incorrect date formatting
- `LEFT(strExpr, integer)` – missing opening or closing brackets
- `CASE WHEN "Absence Attributes"."Total Absence Duration (Days)" > 90 THEN '1' ELSE NULL END` – incomplete formulas

Before:



After:



## Lost Access to an Analysis

When setting permissions in BI, if they are not done correctly this may result in loss of access to an object.

Please see *ESRBI - Managing Permissions and Archiving in ESR BI* for details on setting analysis permissions.

## Blank Screen

If users experience a blank screen when running analyses, clearing the internet browser cache may resolve this error. If the error persists, check with your local IT service desk to see if it is a local issue before raising a service request.



## Loss of Service

If you experience a loss of service to BI, please raise a P3 service request.

## Raising a Service Request

The Self Service Centre provides a priority description to help categorise requests. Any requests incorrectly categorised will be given a new priority.

Please provide as much detail as possible in your SR. If appropriate, upload an archived version of your analysis. This will allow IBM and the NHS Central Team to see how the analysis has been built in BI.

For further information on archiving analyses please see *ESRBI - Managing Permissions and Archiving in ESR BI*.

For access to SSC please contact your local ESR/Workforce team who will be able to request an account for you.

## Development

If you have an idea for how the ESR NHS Central BI Team can improve a Dashboard, or if you have an idea for a new analysis – please raise a P5 service request detailing your proposal. The BI Team will review your proposal and if appropriate ask that you complete a Business Justification Form. All BJFs are sent to be reviewed by the BI review group and National SIG chairs and will be progressed should there be adequate support.

